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ABSTRACT

A course for secretaries who wish to update their skills in written communications and decision making is presented. The course contains 10 sessions. The first five deal with written communication and skills brushup. The remaining five deal with decision-making skills. (CK)

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INSTRUCTOR'S GUIDE FOR AN ADULT COURSE

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COMMUNICATIONS AND DECISION MAKING

Part V in a Series

Preparation for
CERTIFIED PROFESSIONAL SECRETARY
Examination

AC014295

The University of the State of New York
THE STATE EDUCATION DEPARTMENT
Bureau of Continuing Education Curriculum Development
Albany, New York 12224

Part V in a Series
Preparation for Certified Professional Secretary Examination

Communications and Decision Making

A Suggested Adult Business Education
Course

The University of the State of New York
THE STATE EDUCATION DEPARTMENT
Bureau of Continuing Education Curriculum Development
Albany, New York 12224
1972

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Foreword

The course described in this booklet, *Communications and Decision Making*, is generally given as a review for those preparing to take Part V of the Certified Professional Secretary (CPS) examination. Part V of this examination, which is given by the National Secretaries Association (International), bears the same title as this booklet. This course can also be the basis of a class for those secretaries wishing to update their skills in written communications and decision making.

Six courses to cover the six parts of the CPS examination were planned by a committee consisting of the following: Marian N. Batten, CPS, secretary to the manager of Nonexempt Compensation and Benefits, General Electric Company, Schenectady; Hobart H. Conover, chief of the Bureau of Business Education; Carla V.R. Delray, CPS, manager of Office Services and Corporate Planning Administration, Mohasco Industries, Amsterdam; Adrian C. Gonyea, Dean, School of Business, Hudson Valley Community College, Troy; E. Noah Gould, associate, Bureau of Continuing Curriculum; Florence E. Graham, chairman, Business Education Department, Draper High School, Rotterdam; Margaret A. McKenna, associate professor of business education, State University of New York at Albany; B. Bertha Wakin, professor of business education, State University of New York at Albany; and Eugene Whitney, associate, Bureau of Business Education. Mr. Gould and Mr. Whitney were cochairmen.

This course *Communications and Decision Making* (which is the first of the CPS series to be published) was written by Ms. McKenna, while Ms. Wakin directly supervised the writing and is to coordinate the content among the courses in the series. Mr. Gould provided general guidance for this course and for the series, and did the final editing of the manuscript.

We acknowledge with thanks the permission granted by the Institute for Certifying Secretaries of the National Secretaries Association (International) to publish the 1970 CPS examination which appears in the appendix.

HERBERT BOTHAMLEY, *Chief*
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Curriculum Development

GORDON E. VAN HOOFT, *Director*
Division of School Supervision

Message to the Instructor

This instructor's guide is intended as an aid in the presentation of a well organized course. Since it is a review course, those entering it are expected to have a good background in the subject content. Upon completion of the course the student will hopefully have improved and refined his skills in shorthand, transcription, English usage, and written communications, and will be better equipped to take Part V of the CPS examination.

The course has a considerable amount of drill material, particularly for taking dictation and transcribing it. Detailed and specific references are offered for all topics covered, including additional dictation materials. In-basket exercises are provided to give the students practice in decision making as applied to secretarial work.

The content of this booklet is suitable for use in the adult education programs of school districts and of Boards of Cooperative Educational Services (BOCES), and possibly in the community colleges of New York State. The instructor should be a person with both office experience in secretarial skills and experience in teaching communications and decision making. Well experienced Certified Professional Secretaries are another possible source of instructors.

The content of this course can generally be covered in 10 sessions of 3 hours each, but this pattern is by no means universal, nor is it mandatory in any sense. For those students who wish to cover some topics in greater depth, the instructor may wish to suggest materials for independent study.

An instructor or administrator who needs help in planning or conducting a course using this publication may contact the Bureau of Business Education.

HOBART H. CONOVER, *Chief*
Bureau of Business Education

ROBERT H. BIELEFELD, *Director*
Division of Occupational Education Instruction

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Lesson 1
Course Introduction and Skills Brushup

Content Outline	Teaching Suggestions and References
I. Introduction to the Course	Introduce yourself and have the students introduce themselves. Suggest that students give name, employment information, reason for taking course.
A. Course purpose	Explain that the purpose of the course is to improve the students' secretarial skills by providing a brushup of shorthand, typing, and English; also an understanding of effective written communication, and an opportunity to apply office skills in situations requiring decision making ability.
B. Textbooks and references	Students should have at least one reference book. Gavin and Sabin or House and Koebele are well suited for this.*
	Students may need a shorthand book to review brief forms and theory, but this material may be covered in class by the teacher. Any dictation or transcription book that the students already own may be used for review.
	The teacher may also want to suggest that students buy a business communications textbook. Four suitable ones are the first four items in the Bibliography.

*Full reference citations are given in the Bibliography.

Content Outline	Teaching Suggestions and References
	The Secretary, published monthly except in July and August by The National Secretaries Association (International) will be useful to teachers and students, especially for the in-basket exercises which appear in some issues.
C. Course content	Discuss in general terms the content of the course. It includes: Skills brushup: shorthand, typing, grammar, usage, and style. Principles of effective written communication: unity, coherence, and emphasis; clarity, accuracy, work economy; planning the message; opening and closing sentences; human relations in communications. Application of office skills and judgment through in-basket exercises.
II. Skills Brushup (60 minutes)	
A. Brief form review	Using the chalkboard, an overhead projector, or brief form charts, review the brief forms of Gregg Diamond Jubilee Shorthand (DJS) through group reading and dictation. Students who are Simplified writers will encounter no difficulty with DJS outlines. They should be encouraged to review the Simplified outlines if they have a textbook for it.
B. Dictation practice	Dictate some short business letters at 70 and 80 words a minute. Discuss any spelling or punctuation problems that occur. Allow 5 minutes, later in the period, to transcribe one of the letters. Suitable teacher references are Duchan, the two books by Leslie and Zoubek, and the two by Zoubek, all listed in the bibliography.
C. Typing warmup	Provide students with some warmup material and an opportunity to become familiar with the typewriter assigned to them.

Content Outline	Teaching Suggestions and References
D. Letter styles	Discuss the various letter styles with particular emphasis on the blocked or modified blocked form, which is the style used most frequently in business. Review the use and placement of special letter parts: date, inside address, attention line, salutation, subject line, closing lines, reference initials, special notations, etc. Have students transcribe one of the dictated letters in the blocked form, with inside address and appropriate closing lines.
E. Punctuation review: uses of the comma	Explain and illustrate the uses of the comma. Teacher references: Gavin and Sabin, pp. 6-24; House and Koebele, pp. 61-67. Dictate some sentences, then have the students transcribe them and insert the correct punctuation.
III. Unity, Coherence, and Emphasis in Written Communication (45 minutes)	Clear and simple English, according to historian Jacques Barzun, "is no one's mother tongue; it has to be worked for." In working for it one must be concerned with the basic principles of unity, coherence, and emphasis. Teacher references: Aurner and Wolf, pp. 43-55; Brown, pp. 122-125. Use some sentence, paragraph, and letter examples for discussion with students. (Sample questions and problems are included at the end of each chapter in the above-mentioned texts.)
IV. Introduction to In-basket Exercises	As described in *The Secretary*, the in-basket exercise is designed to test both application of basic office skills and judgment in business situations. The instructions are not always explicit. A person completing an in-basket exercise must use good judgment, take actions which seem

Content Outline	Teaching Suggestions and References
	appropriate, and complete items in priority order. Part V of the CPS exam is an in-basket exercise; students will therefore want to become familiar with this testing situation. Distribute and discuss a sample in-basket exercise. These exercises appear in the October 1970, June 1971, and October 1971 issues of *The Secretary*, and possibly in other issues.

Lesson 2
In-basket Exercise and Skills Brushup

Content Outline	Teaching Suggestions and References
I. Skills Brushup (45 minutes)	
A. Theory review	Using recall drills such as those appearing on pages 407-412 of Leslie and others, volume 1, conduct a chalkboard review of some of the shorthand theory principles.
B. Dictation practice	Dictate several short business letters at speeds appropriate for the class--70 to 90 words a minute.
C. Transcription practice	Have students transcribe one of the letters dictated.
D. Memorandum format	Discuss the preparation of interoffice correspondence. Teacher references: Gavin and Sabin, pp. 221 and 222; House and Koebele, pp. 143 and 144.
E. Punctuation review: the semicolon, the colon, and the dash	Explain and illustrate the uses of the semicolon, the colon, and the dash. Teacher references: Gavin and Sabin, pp. 24-35; House and Koebele, pp. 58-61, 67-68, 84-86.
II. Clarity, Accuracy, and Word Economy in Written Communication (45 minutes)	According to Lord Chesterfield, "Every paragraph should be so clear and unambiguous that the dullest fellow in

Content Outline		Teaching Suggestions and References
		the world will not be able to misstate it, nor be obliged to read it twice to understand it." Writers must strive therefore to communicate in a way that is clear, accurate, and concise. Teacher references: Aurner and Wolf, pp. 55-70; Brown, pp. 111-122.
III.	In-basket Exercise (45 minutes)	Distribute an in-basket exercise to the students. Have them determine the action they would take and the order in which they would handle the items. Teacher references: An in-basket exercise appears in some issues of *The Secretary*. If students do not have the magazine, duplicate copies for their use. See item 18 in the bibliography.

Lesson 3
Planning a Written Communication and Skills Brushup

Content Outline	Teaching Suggestions and References
I. Skills Brushup (45 minutes)	
A. Theory review	Continue with the review of shorthand theory, using recall drills as previously suggested.
B. Dictation practice	Dictate several short business letters at 70 to 100 words a minute.
C. Typing tables	Review vertical and horizontal placement; typing titles, subtitles, and column heads; and ruling tables. Have students plan and type a table from handwritten copy. Teacher references: Gavin and Sabin, pp. 241-247; House and Koebele, pp. 43-46.
D. Capitalization	Review the rules of capitalization. Teacher references: Gavin and Sabin, pp. 59-73; House and Koebele, pp. 87-96.
II. Planning a Written Communication (45 minutes)	If the reader is to understand a message, the writer must have a plan. Planning involves several steps: analyzing the situation which gave rise to the communication;determining the purpose of the letter; selecting the contents; planning for unity,

Content Outline		Teaching Suggestions and References
		coherence, and emphasis; arranging the sequence of ideas. Then comes the writing of the letter. Discuss the steps for planning a letter and the plans of organization to follow in different kinds of letters. Teacher references: Aurner and Wolf, Chap. 5; Brown, Chap. 4.
III.	In-basket Exercise (45 minutes)	Using the exercise of the previous week, have students perform the activities. After completion discuss actions taken.

Lesson 4
Opening and Closing Sentences and Skills Brushup

Content Outline	Teaching Suggestions and References
I. Skills Brushup (45 minutes)	
A. Theory review	Continue with review of shorthand theory, using recall drills as previously suggested.
B. Dictation practice	Dictate several short business letters at 80 to 100 words a minute.
C. Transcription practice	Have students transcribe one of the dictated letters.
D. Reports and manuscripts	Review the format for typing reports and manuscripts: margins, spacing, paging, footnotes, and bibliographies. Teacher references: Gavin and Sabin, pp. 228-241; House and Koebele, pp. 171-182.
E. Numbers	Review the rules for expressing numbers in figures and words. Teacher references: Gavin and Sabin, pp. 73-87; House and Koebele, pp. 117-122.
II. Opening and Closing Sentences in Written Communications	Opening and closing sentences must be forceful and clear, but even experts find it hard to get started, and to stop when enough has been said.

Content Outline		Teaching Suggestions and References
		Discuss the importance of the first and last sentences and paragraphs of business letters, and how to write them effectively. Teacher references: Aurner and Wolf, pp. 87-91; Brown, pp. 90-94.
III.	In-basket Exercise (45 minutes)	Distribute copies of another in-basket exercise. Discuss with the students the order in which the items should be done and the action to take on each.

Lesson 5
Human Relations in Written Communications and Skills Brushup

Content Outline	Teaching Suggestions and References
I. Skills Brush-up (45 minutes)	
A. Theory review	Complete the review of shorthand theory using recall drills as previously suggested.
B. Dictation practice	Dictate several short business letters at speeds from 90 to 110 words a minute.
C. Transcription practice	Have students transcribe at least one of the dictated letters.
D. Copy editing exercise	Provide students with a rough draft copy of a letter or short report to be edited and retyped. The copy should include errors of format, typing, punctuation, etc. Not all errors should be marked but students would be expected to correct all of them. Read back and discuss the corrections after the students have typed the letter.
E. Spelling review	Knowing some of the rules of spelling will help students to be better spellers--or at least to avoid frequent trips to the dictionary. Review some spelling guides with the students. Suggest that the students start a list of their own spelling "demons."

Content Outline		Teaching Suggestions and References
		Teacher references: Gavin and Sabin, pp. 106-121; House and Koebele, pp. 97-108.
II.	Human Relations in Written Communication (45 minutes)	In business writing the human relations factors are positive tone, empathy, courtesy, the "you" attitude, and appropriate use of words. Discuss how these factors are related to one another and how they can be achieved in business communications. Teacher references: Aurner and Wolf, Chap. 5; Brown, Chaps. 3 and 6.
III.	In-basket Exercise (45 minutes)	Allow the students to work on the in-basket exercise distributed in the previous lesson. If questions arise have the students discuss them. Reserve 10 to 15 minutes at the end of the period for a general discussion of the exercise.

Lesson 6
Decision Making and Skills Brushup

Content Outline	Teaching Suggestions and References
I. Skills Brushup (45 minutes)	
A. Dictation practice	Dictate several short business letters at speeds from 90 to 110 words a minute.
B. Transcription practice	Have students transcribe at least one of the dictated letters.
C. Copy editing exercise	Provide students with a rough draft copy of a letter, memo, or short report for editing and retyping.
D. Compound words and word division	Compound words may be written solid, as separate words, or as hyphenated words. Style in these matters is continually changing so that up-to-date references are necessary. There are rules, however, that will save trips to the dictionary. Discuss these rules and some examples with students. The basic rules and preferred practices for dividing words at the end of a line should also be discussed. Teacher references: Gavin and Sabin, pp. 122-131 and 134-138; House and Koebele, pp. 109-116; U.S. Govt. Printing Office Style Manual.

Content Outline	Teaching Suggestions and References
II. In-basket Exercise (90 minutes)	Allow students about an hour to work on an in-basket exercise, assigning priorities and completing as many of the tasks as time permits. Spend the last 30 minutes of the class period discussing the exercise, the priorities, and the actions taken.

Lesson 7
Decision Making and Skills Brushup

Content Outline		Teaching Suggestions and References
I.	Skills Brushup (45 minutes)	
	A. Dictation practice	Dictate several business letters at speeds ranging from 90 to 110 words a minute.
	B. Transcription practice	Have students transcribe at least one of the dictated letters.
	C. Copy editing exercise	Have students edit and retype copy from the rough draft.
	D. Grammar review	A review of grammar may be necessary to overcome the faulty language patterns which hinder effective expression. Areas of difficulty may include: agreement of subject and verb, agreement of pronoun and antecedent, proper tenses, cases, plurals, possessives. The teacher may want to start with a diagnostic exercise such as that found in Brown on pages 98 and 99. This will indicate whether or not students need a grammar review and will point out areas of weakness of particular students. Teacher references: Gavin and Sabin, pp. 138-173; House and Koebele, pp. 47-52; Aurner and Wolf, pp. 595-598; Devlin, pp. 632-641.
II.	In-basket Exercise	Have students complete and discuss an in-basket exercise.

Lesson 8
Decision Making and Skills Brushup

Content Outline		Teaching Suggestions and References
I.	Skills Brushup	
	A. Dictation practice	Dictate some short business letters at 100 to 120 words a minute.
	B. Transcription practice	Have students transcribe at least one of the dictated letters.
	C. Copy editing exercise	Have students edit and retype copy from rough draft.
	D. Word usage	Discuss with students words and phrases that are often used incorrectly; for example: all right; almost ; already, all ready; altogether, all together; among, between; anyone, any one; bad, badly; its, it's; lay, lie; may, can; than, then. Teacher references: Gavin and Sabin, pp. 173-187; Devlin, pp. 628-632.
II.	In-basket Exercise	Have students complete and discuss an in-basket exercise.

Lesson 9
Decision Making and Skills Brushup

Content Outline		Teaching Suggestions and References
I.	Skills Brushup	
	A. Dictation practice	Dictate some short business letters at 100 to 120 words a minute.
	B. Transcription practice	Have students transcribe at least one of the dictated letters.
	C. Copy editing exercise	Have students edit and retype copy from rough draft.
	D. Sentence structure	Discuss sentence structure--the way the various words, phrases, and clauses of a sentence are fitted into position. Areas needing particular attention are modifiers and parallel structure. Teacher references: Gavin and Sabin, pp. 171-173; Devlin, pp. 638-641.
II.	In-basket Exercise	Have students complete and discuss an in-basket exercise.

Lesson 10
Decision Making Application

Content Outline	Teaching Suggestions and References
I. In-basket Exercise	Students could profitably spend this period working on an in-basket exercise of the length and complexity of that given in the CPS exam. The decisions made and actions taken should be discussed. An example of such an exercise appears in the appendix. Others can be found in *The Secretary*.

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18. *The Secretary.* Published monthly, except in July and August, by the National Secretaries Association International, 616 East 63rd Street, Kansas City, Mo. 64110. (In-basket exercises are in the issues of Oct. 1970, June 1971, and Oct. 1971.)

Appendix

Part V

1970 Certified Professional Secretary Examination

INSTRUCTIONS FOR PART V OF THE CERTIFIED PROFESSIONAL SECRETARY EXAMINATION

The following instructions are dictated by the proctor and are not printed in the test booklet. This information is needed to complete the in-basket properly.

1. Do the following things in this order:
   a. Review all the in-basket items (A-J) and determine the order in which the work should be accomplished considering factors of time and importance.
   b. On the form, Priority of Completion, at the bottom of Page 2 of the test booklet, record the order in which you believe items A through J should be handled.
   c. On the two loose pages in the test booklet which are titled "Action to Be Taken," there is space to describe the action you will take with each item. Describe the action fully including how you will inform people of your actions and how you will handle appropriate follow-up. Type your answers and confine them to the space allotted.
   d. Whenever an action which you describe includes the preparation of a letter, memo, draft, etc., you should do that work as a part of the problem solution.

2. Item A in the test booklet is an unedited page of a manuscript on which Dr. Rogers is working. Your job is to type it in final form making whatever grammatical corrections are necessary without changing the writing style. There is a May 9 deadline.

3. Item D is work which the student assistant, Mary Lou, completed yesterday. The practice in this office has been for you to supervise Mary Lou's work; her development on the job is primarily your responsibility. You are authorized to sign Dr. Rogers' signature on the work she completes.

4. Items B, C, E, F, G, H, I, and J are to be handled either as instructions on the item indicate or as your judgment dictates.

5. Miscellaneous information which may be helpful in making decisions:
   a. There are ten faculty members on the staff of the Business Education Department.
   b. Travel reimbursement is made on the basis of: mileage at 8¢ a mile; meals, $1.25 for breakfast, $2.00 for lunch, and $4.00 for dinner; and lodging at $9.00 a night.
   c. Faculty meetings are held in Room 326 College Center whenever the room is available.

6. The following items, I and J, were dictated and left on tape by Dr. Rogers before he left for his meeting. Items A-H are printed in the booklet.

   Item I--We have a visiting faculty member who will be here from June 22 to July 5 conducting a two-week workshop. He is bringing his family, which includes his wife and five children. Please get some names and rates of places where they might stay so we can send this information to him.

Item J--Send the following memorandum to the Business Education faculty: Salary adjustment time is drawing near. When the legislature okays the budgets, I suspect there will be a rush to submit recommendations. Also, the Dean of Faculties has just directed that each department will have a Faculty Advisory Committee to make recommendations to the department chairman. Consequently, we need some decisions by May 4. Namely, shall we have a faculty advisory committee? and, if so, who will serve on it and what procedures will be followed? Since I will be out of town all next week, I have asked Dr. Oliver to chair the meeting which will be held at 3 P. M. Monday, May 4, in Room 326 College Center. (Sandi, check to make sure the room is available at this time.) It is immaterial to me whether we have such a committee, but if we do, the committee members should begin their deliberations soon.

INSTITUTE FOR CERTIFYING SECRETARIES

PART V

COMMUNICATIONS AND DECISION MAKING

(2 hours)

YOU MAY MAKE ANY NOTATIONS YOU WISH ON THIS TEST BOOKLET.

EXAMINATION CONTENT: This is an in-basket exercise which is designed to test both the application of your basic office skills and your judgment in a number of situations. The instructions may not always be as explicit as you might like; however, this is an intentional part of an in-basket exercise. It requires you to use your own judgment and to take any action which seems appropriate. Your work will be judged on the adequacy of action and quality of work performed.

JOB DESCRIPTION: You are Sandi Hobson, secretary to Larry Rogers, Business Education Department chairman at Portland State College. Your job involves various office activities such as collecting and organizing necessary materials or information for reports; maintaining a variety of office records; and processing office mail, composing correspondence, and taking and transcribing dictation.

You handle telephone calls, correspondence, and personal meetings with persons in other departments outside the school to obtain or supply factual information. You consult your supervisor only when clarification or interpretation of organization policy is in question. You supervise the work of part-time student assistants who work in the department in a variety of capacities.

DIRECTIONS: As you begin each item, type your name, candidate number, and item designation (A-J) in the upper right-hand corner of the material. This information may be handwritten after time is called, but a penalty will be assessed. If an item proves to be too difficult, move on to another one. Use your judgment in determining the order in which you attempt items. Be sure to hand in partially completed items. Budget your "work day," allowing adequate time for each job. Notes which you make in the test booklet will not be considered as a part of the problem solution.

In scoring this part of the examination, points will be deducted for each error, the amount depending on the seriousness of the error. DICTIONARIES AND REFERENCE BOOKS ARE NOT TO BE USED.

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Institute for Certifying Secretaries
1970

THE SETTING: You were out of the office yesterday, Thursday, April 30, attending an Executive Secretarial Seminar which was presented by the local NSA Chapter. When you arrive at the office on Friday, May 1, you find:

1. the items in the Part V booklet in your in-basket.
2. Dr. Rogers has left for a meeting. He will return at 10:30, but must leave by 10:50 to take a plane because he will be attending an out-of-town conference. He will return to the office on May 8; meanwhile he can be reached by telephone.

CALENDAR:

April

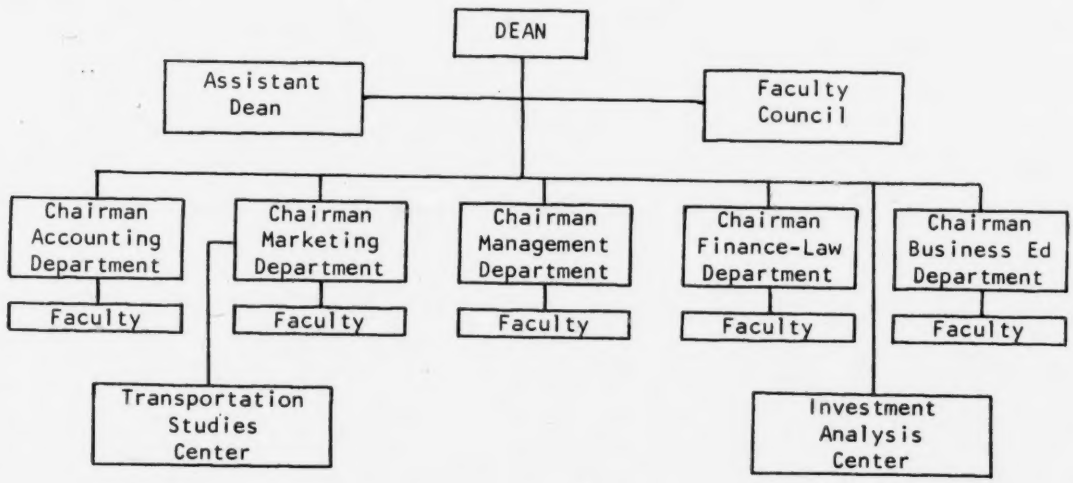
S	M	T	W	Th	F	S
26	27	28	29	30		

May

					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16

ORGANIZATION CHART:

School of Business Administration



PRIORITY OF COMPLETION:

Item A_____ Item F_____

Item B_____ Item G_____

Item C_____ Item H_____

Item D_____ Item I_____

Item E_____ Item J_____

ACTION TO BE TAKEN

Describe below the action to be taken with each "In-Basket" item:

Item A:

Item B:

Item C:

Item D:

Item E:

Item F:

Item G:

Item H:

Item I:

Item J:

Sandi
A student did this for me yesterday. I have a May 9 deadline for this one. Will get order pages to you when I return.

SYSTEMS ANALYSIS

Systems analysis is a planned approach to the activities needed to attain desired objectives. Each of the various activities of the firm (sales production and accounting for example) involve a great many work sequences. These work sequences constitute systems thus the firm can be viewed as a network of systems. Systems analysis studies work sequences in an effort to simplify and intigrate the work of many different people. The objective of systems analysis to create a total system within the firm so that every work sequence makes a contribution to the organizational objectives.

Systems analysis can deal with as broad a topic as developeing the myread time schedules and the work flow for a huge construction job or as small a task as deciding the best arrangment for a work station in the duplicating room. Systems analysis are definately an area of specialization and it encompasses such areas of consentration as master system planning data processing analysis, records and report analysis, forms design communications analysis and improving methods and proceedures.

The improvement of methods and procedures and the development of standards are a part of the total task of the systems department. These tasks involves the use of such tools as time ladders, process flow charts, work sampling, time-motion studies. The developement of standards for office work is a relatively new area of endevor and it is one in which a great deal of imagination can yet be applied. Until fairly recent people considered office work to varied to standardize. It appears that the trend toward greater automation of office services will hasten the implimentation of production standards to this area of work.

Item B

1222 B, Werner Park
Ft. Campbell, Kentucky 42223

April 27, 1970

Dr. Larry Rogers
Business Education Department
Portland State College
P.O. Box 751
Portland, Oregon 97207

Dear Dr. Rogers:

Thank you very much for your letter of April 17 informing me of the general requirements which must be completed in order to obtain a teaching position in Business Administration. I am interested specifically in obtaining an MBA and teaching at the community college level. However, you mentioned an internship program in which I would work half time for one year as an avenue open to me should I seek a state certificate for secondary teaching. Would this program be available to me if I were working for an MBA but not state certification?

I would appreciate very much your informing me more specifically of the requirements and opportunities present at the community college level of teaching Business Education. I would also like to know more about the internship program, should it be open to me.

I will be looking forward to hearing from you.

Sincerely,

Byron L. Jones

Byron L. Jones

- 4 -

SYMBOLIC FLOWCHARTING as a TEACHING DEVICE

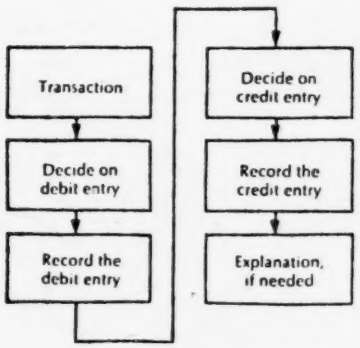
BY

Larry Rogers

Visual presentations help students to clarify relationships and to visualize the total idea. Most accounting concepts and procedures can be taught effectively by displaying them visually on a flowchart. Although the use of flowcharts is relatively new, pictorial or graphic presentations are certainly not new to business teachers; they are well acquainted with organizational charts and pictographs.

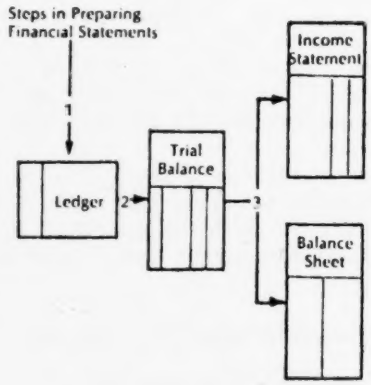
In the past, the most common types of flowcharts used in textbooks were the block and facsimile types. Currently, however, greater use is being made of the symbolic flowchart. Although the three types serve essentially the same purpose, the symbolic flowchart has some definite advantages as a teaching device.

Block flowcharting, a simple way of illustrating a procedure, basically involves summarizing the steps in a procedure and arranging them in the order of the procedural flow. A block flowchart that illustrates the steps in recording a general journal entry appears below:



A block flowchart is easy to prepare and does visualize the flow of the process. However, a weakness exists in that no clues are provided as to the type of activity involved in each step. Thus, the block flowchart is little more than a variation of a summary list of steps in a process.

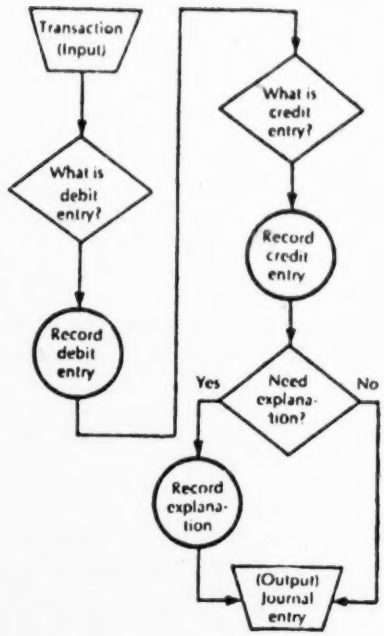
Facsimile flowcharting is more stimulating visually than the block flowchart because the facsimile flowchart uses illustrations to represent items in a workflow. The major operations involved in preparing financial statements can be depicted by using facsimile flowcharts (see illustration).



Key:
1. Pencil-foot and balance ledger account.
2. Prepare trial balance.
3. Prepare financial statements.

The facsimile flowchart describes the major steps in a workflow but, like the block flowchart, does not depict the type of activity involved in each step. In addition, the facsimile flowchart requires a great deal of time to prepare.

Symbolic flowcharting has great potential both as a teaching and a learning device. This type of flowcharting overcomes the disadvantages of the other flowcharting techniques but retains their advantages. The primary advantages of symbolic flowcharts are



that: (1) the symbols are easy to draw (only a template is needed); and (2) each symbol is unique in design, thus providing the reader with visual clues to the type of action being taken.

The following example of symbolic flowcharting depicts the steps in recording a general journal transaction:

In this particular presentation, three symbols have been used:

1. An input/output symbol ▱, to indicate the data that initiates the process and the finished product provided by the data processing system.
2. An operation symbol ○, to indicate the points at which some physical manipulation of the data occurs.
3. A decision symbol ◇ to indicate the points at which questions must be answered before the next operation can be performed.

An individual familiar with the symbols recognizes simply by reading the chart that in the procedure there are three decision points and three points at which operations may have to be performed. It can also be seen that one of the decisions has alternative courses or, in technical terminology, a *branch*.

Teaching Flowcharting How flowcharting is taught is contingent upon the teacher's objectives. In the context of this article, flowcharting is considered a device for teaching accounting

systems and procedures and not a vocational skill. Thus, students need not master the technique of flowcharting. However, using flowcharts to teach accounting systems and procedures will provide a basis for the development of flowcharting as a skill for those students who study programming.

Basically, utilizing the flowcharting technique involves (1) teaching the symbolism by definition, explanation, and illustration; and (2) providing some practice in flowcharting by demonstration, discussion, and application.

Values Derived from Teaching Flowcharting Flowcharting can be a powerful teaching-learning device in the accounting classroom. It is a tool not only for the academically talented; all students can benefit from the use of flowcharting, and all can participate (although, of course, not all equally well). Moreover, flowcharting is a motivational technique, yet it is not just a gimmick to generate interest. To prepare a flowchart, the student must identify the steps in a procedure and place them in logical order. This activity causes the student to think, to reflect, and to state in his own words the solution to a problem.

Flowcharting allows the teacher to present a total system (in a preview), to relate different steps as a procedure is demonstrated, to recapitulate at any point in the presentation, and to show relationships that exist between systems. Flowcharts can be prepared to demonstrate a minute accounting operation or a total system.

By implementing flowcharting techniques, the rudiments of data processing become an integral part of accounting instruction. The student becomes familiar with the language of business, such as source document, input/output, looping, branching, workflow, system, procedure, process, and operation. In addition, the student learns how to read a flowchart, document a problem, and prepare a flowchart. Finally, because the student encounters a manual data processing system at the beginning of his accounting course, he is progressing from the simple to the complex.

Update your accounting instruction by using and teaching symbolic flowcharting. It will help to make your presentations clearer, and it will enhance student understanding. In short, you will be adding a simple yet effective visual aid to your instruction.

Prepare a half-page abstract of this article to go out this afternoon

JR

Item D (4 pieces)--
Mary Lou's work from
yesterday.

Portland State College

P.O. Box 751 Portland, Ore. 97207

School of Business Administration 503/226-7271
Business Education Department

May 1, 1970

Miss Carol Smithson
16208 S. E. Brooklyn Street
Portland, OR 97236

Dear Carol:

I have just recieved an information copy from the Scholarship Committee of the National Secretaries Association indicating that you have been awarded its $100 scholarship.

On behalf of the faculty of the Business Education Department, I wish to extend congratulations to you. We are certainly pleased to have you represent the business education student group at Portland State College.

Best wishes in your future efforts.

Sincerely,

Larry Rogers, Head
Business Education Department

LR/mlw

Portland State College

P.O. Box 751 Portland, Ore. 97207

School of Business Administration 503/226-7271
Business Education Department

May 1, 1970

Father Paul Seknett, Principal
North Catholic High School
3169 North Lombard
Portland, OR 97207

Dear Father Seknett:

Miss Sheila Franklin took a qualifying examination in typewriting on April 25, 1970. The examination tested her straight-copy typing ability, her ability to set up and type a variety of problems, and her general knowledge of typing mechanics.

She performed successfully on all aspects of the examination. She has a high-level stroking rate and is an extremely accurate typist. For example, her five-minute typing speed was 70 words a minute with no errors.

In addition to this, Miss Franklin and I talked for a period of time about her interest in teaching typewriting, her teaching methodology, and her access to assistance and sources of information if teaching problems develop. In all instances I was extremely pleased with her perfomance and would have no hesitation in recommending her as a typewriting teacher.

Sincerely,

Larry Rogers, Head
Business Education Department

LR/mlw

Portland State College

P.O. Box 751 Portland, Ore. 97207

School of Business Administration 503/226-7271
Business Education Department

May 1, 1970

Occupational Education Program Development
Institute for Post-Secondary Institutions
American Association of Junior Colleges
1315 Sixteenth Street, N. W.
Washington, D. C. 20036

Gentlemen:

Is the Program Development Institute for Post-Secondary Institutions, which is being held next July in San Francisco, designed to be of value to four-year institutions whose major emphasis is on business teacher education?

I have a faculty member who has indicated some interest in attending the Institute, but I can't really tell from the literature at hand what benefit we might derive from his experience.

Sincerely

Larry Rogers, Head
Business Education Department

LR/mlw

OREGON STATE BOARD OF HIGHER EDUCATION

TRAVEL REIMBURSEMENT REQUEST

Item D-4

NAME	ADDRESS
Larry Rogers	632 S. W. Hall--Room 101 East Hall--Portland, Oregon
TITLE	**INSTITUTION** / **DATE**
Associate Professor	Portland State College / May 1, 1970

DATE	DEPARTURE ARRIVAL TIME	ITINERARY	PRIVATE AUTO MILES	PRIVATE AUTO AMT.	MEALS BREAK.	MEALS LUNCH	MEALS DINNER	MEALS PER DIEM	LODGING	DAILY TOTAL
4/25/70	7:30 am 1:30 pm	Lv Portland, Oregon Arr Seattle, Washington	362 round trip	26.96				7.25	9.00	43.21
4/26/70		Seattle, Washington						7.25	9.00	16.25
4/27/70	7:00 am 1:00 pm	Lv Seattle, Washington Arr Portland, Oregon			1.25	2.00				3.25

OTHER EXPENSES: TRANSPORTATION FARES, REGISTRATION FEES, TELEPHONE CALLS, ETC. (DESCRIBE)

		SUB-TOTAL 63.21
4/25/70	Registration fee for Convention	5.00
		TOTAL 68.21

SOC. SEC. OR VENDOR NO.	REIMB. CODE	TRANS.	AUDITED BY
555-62-3000		080	

REQ. NO.	ACC'T. NO.	FUND	CLASS	AM'T. (IF SPLIT)
9068	27-4826		5	

REIMBURSEMENT STAMP

Purpose (Required if paid from Federal Funds)

I certify that the travel expense as itemized above has been incurred in the performance of my official duties, that the charge therefor is just, and that no part thereof has been heretofore paid.

CLAIMANT'S SIGNATURE	PRES., DIV. OR DEP'T. HEAD APPROVAL	BUSINESS MANAGER APPROVAL

CO-172 REV. 7/67

Item E

MAY 1 1970

Oregon Council on Economic Education

Portland State College
P.O. Box 751
Portland, Oregon 97207
Phone 226-7271

April 30, 1970

Dr. Larry Rogers, Head
Business Education Department
Portland State College
Campus

Dear Larry:

This is a formal invitation to the economic education conference that we have arranged for May 12-13. The idea, as I am sure I have explained, is to tell curriculum people from districts throughout the state about the economic education guides and about the "package" inservice training course.

Since you have been active in developing the "package" inservice training course, I would like for you to help me with the Tuesday morning presentation. We will be showing a sample of the materials we have developed and demonstrating how they would actually be used in the public schools.

The Council will take care of your expenses while the conference is in session.

Cordially,

John C. Swinney

John C. Swinney
Education Director

jt

Item F

MAY 1970

The University of North Dakota

GRAND FORKS 58201

Bureau of Educational Research and Services
Box 8009 University Station

April 28, 1970

Department Chairman
Department of Business Education
Portland State College
Portland, Oregon 97207

Dear Sir:

As a Trainee in the Bureau of Educational Research at the University of North Dakota, I am attempting to gather information on the types of brochures and other materials that are available from the colleges and universities for promotional purposes on different programs in the field of Business Education.

I would very much appreciate it if you could send me promotional brochures, pamphlets, and other printed materials (but not college catalogues) that are available from your department on the two-year secretarial program, the four-year program, the master's degree program, and the doctoral program.

I hope you feel you can help me in gathering data for this project.

Sincerely yours,

Allison Michaels

(Miss) Allison Michaels

Item G
MAY 1970

PORTLAND COMMUNITY COLLEGE

12000 SOUTHWEST 49th AVENUE, PORTLAND, OREGON 97219 • (503) 224-3040

April 30, 1970

Dr. Larry Rogers
Portland State College
P. O. Box 751
Portland, Oregon 97207

Dear Larry:

Recently you received an announcement of the meeting of faculty members in business in the community and senior colleges in Oregon, to be held Saturday, May 24, at Portland Community College. We thought that it would be well to have co-chairmen for the different interest group meetings. In keeping with this idea, could we count on you to ask someone from your institution to help chair both the morning and afternoon discussions on Skill Subjects? We are asking someone from Mt. Hood Community College to serve as co-chairman with the person from Portland State.

Would it be possible for you to let me know prior to May 24 who will function in this capacity?

Very truly yours,

Ludwick J. Densmore

Ludwick J. Densmore
Chairman
Business Education

LJD:jea

Item H

4242 S. E. Trenton Place
Portland, OR 97219
April 30, 1970

Dr. Larry Rogers, Head
Business Education Department
Portland State College
P. O. Box 751
Portland, OR 97207

Dear Dr. Rogers:

Although I submitted my application several weeks ago, I have not yet heard if I am to be accepted into the Business Education graduate program. I wish to attend summer school if I can work toward a master's degree. However, I need to know by Monday, May 4, whether I am going to be admitted. I have been offered a summer teaching job, and I have to give the principal an answer Monday.

Will you please find out for me what is holding up my application and let me know if there is anything more I need to do. You can call me at 244-5928.

Thank you for your assistance and immediate reply.

Very truly yours,

Dora Slater

(Mrs.) Dora Slater

1970 PART V IN-BASKET

Recommended Priorities and Actions

The items in the in-basket fall into three groups and the ranking assigned to them within the group is unimportant. *First-priority* items are those which require immediate attention and can be done without further instructions. *Second-priority* items are those which are relatively urgent, but which raise questions that Dr. Rogers should answer before he leaves. *Third-priority* items can be done as time allows. There are three first-priority items, four second-priority items, and three third-priority items. Item G may be classified as either a second-or third-priority item.

	Items	Ranking
1st Priority	C, D, and J	1, 2, or 3
2nd Priority	E, G, H, and I	4, 5, 6, or 7
3rd Priority	A, B, and F	8, 9, or 10

Actions Taken

The actions described here are expressed in general terms because there is a variety of ways in which each task could be done. Any specific information or follow-up system would be acceptable. This does not represent a sample of a candidate's answer but the type of information that would be included in the answer.

Item A
1. Copy would be edited
2. Copy would be retyped
3. Employer would be informed of completed task
4. Employer would be reminded of deadline for completed manuscript

Item B
1. Letter would be composed/typed
2. Letter would be signed and mailed
3. Employer would be informed of action

Item C
1. Article would be abstracted
2. Abstract would be typed
3. Dr. Rogers would be asked where to send abstract
4. Abstract would be mailed
5. Letter of transmittal would be typed
6. Employer would be informed of action

Item D
1. Work would be checked
2. Correct work would be signed and mailed
3. Incorrect work would be returned to subordinate
4. Employer would be informed of completed work

Item E
1. Dr. Rogers would be asked if he will attend
2. Person would be called with answer, OR
   Letter would be typed, signed, and mailed with answer
3. Employer would be informed of action
4. Employer would be reminded of conference

Item F
1. Material would be gathered
2. Letter would be answered, signed, and mailed
3. Employer would be informed of action

Item G
1. Dr. Rogers would be asked for his recommendation, OR
   Letter would be sent indicating Dr. Rogers is out of town (Second alternative if Item G is given third priority)
2. Letter would be composed, signed, and mailed
3. Employer would be informed of action

Item H
1. Dr. Rogers would be asked what steps to take, OR
   Person's status would be checked and Dr. Rogers would be informed after his meeting
2. Person would be called, OR
   Letter would be typed, signed, and mailed
3. Employer would be informed of action

Item I
1. After meeting, Dr. Rogers would be asked for more information such as name and address, ages and sexes of children, and exact accommodations desired
2. Information would be obtained by telephone
3. Information would be held for Dr. Rogers' return, OR
   Letter would be typed, signed, and mailed
4. Employer would be informed of action

Item J
1. Room for meeting would be reserved
2. Memo would be typed and signed
3. Memo would be distributed
4. Employer would be informed of action

How Secretaries Prepare for the CPS Examination

An informal survey was made several years ago by Dr. Donald Mulkerne, Professor of Business Education at the State University of New York at Albany, to learn how secretaries prepared for the CPS examination. Dr. Mulkerne made a one-page questionnaire and sent it to a number of people who had successfully completed the examination.

The study shows that all of those surveyed, regardless of educational level, felt that some kind of review is necessary. Most of them stated that a concentrated review with others preparing to take the examination was most beneficial. Most also agreed that there is no substitute for on-the-job experience in administrative secretarial work, but that study of subject content and related information is also very helpful.

Many who had completed the CPS examination successfully felt that the attitude and mind set of a person taking the examination were important in preparing for it. They held the opinion that more secretaries should take it with a positive attitude—with the idea of passing all parts the first time. While some fail one or more parts, this happens in all professional examinations and is no reason for discouragement. The wide range of knowledge and the broad competences covered in the examination show clearly that it is a professional examination. Even the best professionals have some area of weakness which they can imporve upon when preparing for the exam the second time.

Many of those surveyed stated that a relaxed attitude and a calm outlook are very helpful. They suggested that the examinee should read each question carefully, determine exactly what is being asked for, and concentrate on the answer. They agreed also that common sense must be applied in reading and answering the questions.

Many of those surveyed found that it was best to set aside a definite time for study and to use it. Also, that they could study best early in the morning when it was quiet. The candidate should be aware, they pointed out, that those who have been away from studying for a few years will very likely have to relearn the discipline and technique of studying.

Many successful candidates followed the CPS bibliography and the Study Guide in deciding what to study. They also found that reading *The Secretary* and at least one book on each subject was good preparation. They agreed on the importance of reading current news, including business news, and reading them systematically.

Many kept a CPS notebook in which they recorded information for the examination, with a separate section for each part so the information would be classified and in a good order for quick review.

Many agreed that preparing for the examination was a real challenge for them. They also agreed that it was a very stimulating experience and helped them on the job whether they passed it or not.

ERIC Clearinghouse
APR 24 1973
on Adult Education